BATTS TAX SERVICE

P. O. BOX 69 SORRENTO, LA 70778
47010 HIGHWAY 937, ST. AMANT, LA 70774
225-715-8966
BATTSTAXES@GMAIL.COM

Tax Preparation Checklist

All Clients Need:

- ☐ All W-2s for the year
- ☐ 1099s for all income
- ☐ Loan Statements

New Clients Need:

- ☐ Copy of last years returns
- ☐ Social Security Numbers - filer, spouse, any dependents being claimed
- ☐ Dates of birth - filer, spouse, any dependents being claimed
- ☐ Bank account and routing number for direct deposit
- ☐ Accurate mailing address

Home or Rental Properties:

- ☐ 1098s: Mortgage Interest, Equity, Student Loans
- ☐ Real Estate Taxes Paid
- ☐ Insurance Premiums
- ☐ Energy Efficient Upgrade amounts/receipts
- ☐ Rental Income
- ☐ Mileage for Rental Property
- ☐ Receipt totals for Rental Repairs and Upgrades

Donations:

- ☐ Charitable Contribution Reports
- ☐ Donation Receipts

Business Owners:

Schedule C

- ☐ Tax ID if not your Social Security Number
- ☐ Insurance Premiums & Expenses
- ☐ Business Income & Expense totals
- ☐ List of Assets & Equipment
- ☐ Mileage Logs

Deductions:

- ☐ Medical/Dental Expenses
- ☐ Health Insurance Premiums
- ☐ IRA & HSA Contributions
- ☐ Vehicle Purchase Sales Tax
- ☐ Childcare Expenses
- ☐ Amount Paid for Last Years Tax Prep
- ☐ Education Expenses (Loan Interest, Tuition, Supplies) * 1098-T

Miscellaneous:

- ☐ IRA/401K Contributions
- ☐ Digital/Crypto Documentation
- ☐ Dependent Education Expenses - uniforms, fees, etc